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A Study of the School System
Secretary-Treasurer
in Alberta

Summary Report

prepared by
Peat, Marwick & Partners

for:

planning & research

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A STUDY OF THE SCHOOL SYSTEM

SECRETARY-TREASURER

IN ALBERTA

PEAT, MARWICK and PARTNERS

under contract to Alberta
Education
Edmonton, Alberta, Canada

APRIL, 1979

April 30, 1979

Mr. W.L. Hill
Associate Director
Planning and Research
Alberta Education
Devonian Building
11160 Jasper Avenue
Edmonton, Alberta
T5K 0L2

Dear Mr. Hill:

From mid-1978 to early 1979, Peat, Marwick and Partners undertook a study of the position of school secretary-treasurer in the Alberta education system. The study examined the following facets of the position:

- legal position
- functions
- profile of secretary-treasurers
- conditions of employment
- recruitment practices
- role relationships.

The report, enclosed, details the approach which we took in conducting the study and summarizes our findings and conclusions. Study findings are based on a review of studies and legislation, personal discussions with some individuals in the Alberta education system and a questionnaire circulated to secretary-treasurers, trustees and superintendents.

STUDY FINDINGS

Legal Position

Legislation describes the legal position of the secretary-treasurer in Alberta. According to The School Act, divisions and districts are required to appoint a secretary-treasurer and notify the Minister of Education of the appointment. The act also requires boards to arrange for the bonding of individuals appointed to the position. Generally, boards have the authority to establish policies regarding duties and conditions of employment. However, special duties related to the secretary-treasurer's position as the corporate secretary of the board are set out in The School Act, The School Election Act, and The Municipal Election Act. A secretary-treasurer would be liable for offences committed in carrying out these duties.

In the county system, the council must appoint a secretary-treasurer with responsibility for municipal as well as school affairs. The council is required to notify the Minister of Municipal Affairs in addition to the Minister of Education of the appointments. Like the school secretary-treasurer, the county secretary-treasurer must be bonded. While the duties and powers of school secretary-treasurers are not set out in legislation, the municipal duties of the county secretary-treasurer are described in The Municipal Government Act. The county secretary-treasurer is responsible for the special duties of a municipal secretary-treasurer as well as those of the school secretary-treasurer. Whereas boards in districts and divisions have flexibility in determining terms of employment, the county council is required to give the secretary-treasurer adequate notice and a fair hearing on dismissals.

In some larger counties an assistant secretary-

treasurer is appointed to perform the duties of the school secretary-treasurer. Because the intentions of The County Act are unclear, there have been conflicts between the board and the council over the appointment of an assistant secretary-treasurer for education.

All boards, unless exempted by the minister, are required to appoint a superintendent of schools as well as a secretary-treasurer. Section 65 of The School Act which permits the board to delegate any of its powers to the superintendent appears to imply that the superintendent is the more senior of the two officers in districts and divisions. However, the legislation does not define in precise terms the relationship between the superintendent and the secretary-treasurer. Confusion exists in many counties over the role of these officers as well. While The School Act implies that the superintendent is the more senior of the two officials, it seems that The County Act intended the county secretary-treasurer to be the senior administrative official of the county as well as its committees.

Functions

The secretary-treasurer, an executive officer of the board, is primarily responsible for the corporate and financial affairs of the school jurisdiction. Many secretary-treasurers have also been delegated specific responsibility for transportation, purchasing, and property management. In most jurisdictions, the secretary-treasurer takes an active role in personnel administration. About 70% of the respondents supervise non-instructional staff. Other personnel functions such as labour relations and the supervision of employee records are often performed by the secretary to the board. As well, most

secretary-treasurers assist the board in explaining policies to the public and in maintaining liaison with the municipality and the Department of Education.

Profile of
Secretary-Treasurers

Although there are a substantial number under 35 years of age as well as a few nearing retirement, most of the secretary-treasurers are at the midpoint of their career. Sixty percent of the respondents are between the age of 35 and 54. Almost 1/3 of the positions are filled by women.

Approximately 40% of the secretary-treasurers have had some post-secondary education. More secretary-treasurers with post-secondary education had taken courses in business administration than in other disciplines. Besides formal schooling, most secretary-treasurers have benefited from courses through the Local Government Certificate Program, the Institute of Chartered Secretaries and Administrators or a recognized accounting institute. More than 25% of survey respondents plan to take additional course work.

The employment experiences of secretary-treasurers are diverse. While almost 40% have had previous experience in school business administration, other secretary-treasurers came to the position from public accounting practices, classroom teaching, government posts, or management positions with private industry. More than 1/2 of the secretary-treasurers have 5 years or more tenure in their present position. As well, most of the respondents indicated that they wished to remain in their present position. Some secretary-treasurers aspire to positions with larger school jurisdictions, municipalities, or private industry.

Conditions of
Employment

Conditions of employment vary. Many secretary-treasurers earn between \$20,000 and \$30,000. On the other hand, part-time secretary-treasurers earn less than \$15,000 while those employed by large city districts have incomes in excess of \$35,000. Except in town and rural jurisdictions, most boards contribute to a pension plan, life insurance, and health care on behalf of the secretary-treasurer. As well, boards usually reimburse secretary-treasurers for expenses associated with their employment such as accommodation, meals, transportation, and fees. Approximately 1/4 of the respondents have a car allowance in addition to mileage. Although the majority of boards encourage the secretary-treasurer to take advantage of conferences and workshop, very few boards provide long term professional leave. Respondents generally had 3 to 4 weeks of vacation each year. Less than 10% of the secretary-treasurers have a contract specifying the conditions and terms of employment.

Role Relationships

One aspect of this study deals with role relationships involving the secretary-treasurer. We assessed the secretary-treasurer's relationship with the board, the superintendent, the Department of Education, and the School Business Officials of Alberta. In the county system, we also examined the relationship of the assistant secretary-treasurer for education and the county secretary-treasurer.

Relationship with
the Board

Some secretary treasurers have concerns regarding their

relationship with the board. These concerns include:

- lack of input in policy decisions
- intervention by trustees in day-to-day administration
- lack of staff
- inadequate compensation and benefits.

While some secretary-treasurers felt that they lacked input in the policy making process, a few trustees thought the secretary-treasurer attempted to influence policy outside his areas of responsibility.

Relationship with
the Superintendent

Secretary-treasurers and superintendents identified problem areas which bear upon the relationship. The following problems were identified by some secretary-treasurers:

- lack of communication
- confusion over job responsibilities
- appointment of superintendents with limited experience in administration
- frequent turnover of superintendents in small jurisdictions.

A number of superintendents as well, expressed concern about communication, definition of job responsibilities and qualifications.

From survey responses and interview input, it appears that the relationship between the secretary-treasurer and the superintendent depends largely on the administrative structure in

the jurisdiction: unit, dual, or multiple administration. In jurisdictions with unit administration, the superintendent is the chief executive officer of the board and all other officers including the secretary-treasurer are responsible to the board through him. Both the superintendent and the secretary-treasurer are responsible to the board in dual systems while in jurisdictions with multiple control structures, maintenance or transportation supervisors report directly to the board as well. Survey results seem to indicate that unit administration is the preferred structure. Expressed advantages of unit administration over dual or multiple administration are:

- less confusion over job responsibilities in a unit system because the superintendent is responsible for designing an appropriate structure
- increased communication among senior officers of the board through an administrative council
- one individual has final authority for the operation of the system.

Although unit administration tends to facilitate communication and definition of job responsibilities, harmonious relations between the secretary-treasurer and the superintendent in unit systems also depend on the qualifications of each individual respect for established lines of authority, and adequate job descriptions.

Relationship with the
County Secretary-Treasurer

In some larger counties, an assistant secretary-

treasurers has been delegated responsibility for school affairs. Factors impinging on the relationship between the assistant secretary-treasurer and the county secretary-treasurer are:

- responsibility of the assistant secretary-treasurer to the board as well as to the county secretary-treasurer
- attempts by some superintendents to make the assistant secretary-treasurer his subordinate
- confusion over the functions of the assistant secretary-treasurer vis-a-vis the county secretary-treasurer.

Relationship with
the Department

A number of secretary-treasurers voiced concerns regarding their relationship with the Department of Education. These concerns include:

- lack of career mobility within the department
- not a senior enough level position in the department through which a thorough understanding of the duties performed by secretary-treasurers can be vetted
- infrequent contact with field administrative officers.

Role of the School Business
Officials of Alberta

Over 80% of the respondents are members of the School

Business Officials of Alberta. The association provides a number of services for its membership including:

- information
- professional development
- liaison with the ASTA and the department
- participation in research projects.

Many members would like the association to expand its activities in each of these areas.

Recruitment Practices

The recruitment of a secretary-treasurer usually takes 2 to 3 months allowing time to establish a committee, determine qualifications, recruit and screen individuals, and appoint the successful applicant. In districts and divisions, the selection committee is composed of board members and the superintendent, whereas in counties, the councillors themselves sometimes make the selection. One of the first tasks of the selection committee is to establish qualifications. Generally, accounting and administrative experience are essential. Candidates with post-secondary education in business administration, accounting designations, or the Certificate in Local Government are given preference. Personal factors are considered as well. To attract qualified applicants, the selection committee advertises in provincial newspapers and sometimes in major Canadian papers and professional journals. A few boards have sent circulars to association members informing them of the vacancy. Most jurisdictions have spent \$500 to \$1,000 on advertising. The resumes of applicants are reviewed and then interviews are

conducted with suitable applicants. After an assessment of candidates, the committee makes its selection. Most secretary-treasurers are appointed to continuous positions. However, a few secretaries have signed contracts with the board ranging in length from 1 to 5 years.

STUDY RECOMMENDATIONS

We developed recommendations based on study findings. Recommendations were directed to the Department of Education, the Department of Municipal Affairs, school boards, and the School Business Officials of Alberta.

Department of Education

- designation of the superintendent in districts and divisions as chief executive officer in legislation
- minimum qualifications for the position of secretary-treasurer
- bonding requirement for all employees of the board
- procedures for dismissing secretary-treasurers
- placement of field administrative officers in regional offices
- creation of an assistant deputy minister of finance
- establishment of a fund to enable secretary-treasurers to develop a series of seminars.

Department of
Municipal Affairs

Creation of a task force including representatives from
the Department of Education to investigate the following issues:

- powers of the board vis-a-vis the county council
- committee structure
- powers of the reeve vis-a-vis the chairman of the board
- communication between the council and the chairman of the board
- representation of educational units on the board of education
- position of the secretary-treasurer vis-a-vis the superintendent
- apportionment of shared costs and revenues.

School Boards

- negotiation of a formal contract of employment with the secretary-treasurer
- review of the secretary-treasurer's compensation to ensure comparability with the compensation of secretary-treasurers in similar positions as well as other senior officers of the board
- development of an expense policy for the position
- establishment of a budget for short term professional leave

- development of policy guidelines to minimize intervention by trustees in administration
- an annual performance review
- inclusion of the superintendent on the committee formed to select a secretary-treasurer
- appointment of the secretary-treasurers in divisions and districts as assistant superintendent of business affairs
- development of job descriptions
- establishment of an administrative council to facilitate communication.

School Business
Officials of Alberta

- newsletter to inform members of association activities
- development of a series of seminars which could be offered to zones on a regular basis
- closer relationships with the Alberta School Trustees' Association, the Conference of Alberta School Superintendents, and the Department of Education
- creation of a permanent secretariat.

Peat, Marwick and Partners appreciates this opportunity of providing assistance to the Department of Education. The

Mr. W.L. Hill
April 30, 1979

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steering committee under the direction of Mr. W.L. Hill gave us valuable guidance and assistance in conducting this study. Members of the steering committee were B. Worbets, E. Murray, A. Charles, J. Sanders, W. Mills, and R. Plaxton. As well, we are most grateful for the cooperation afforded us by the School Business Officials of Alberta, the Alberta School Trustees' Association and the Conference of Alberta School Superintendents. We hope that the study will be useful in clarifying the role of the secretary-treasurer in the Alberta education system.

Yours truly,

PEAT, MARWICK and PARTNERS

